



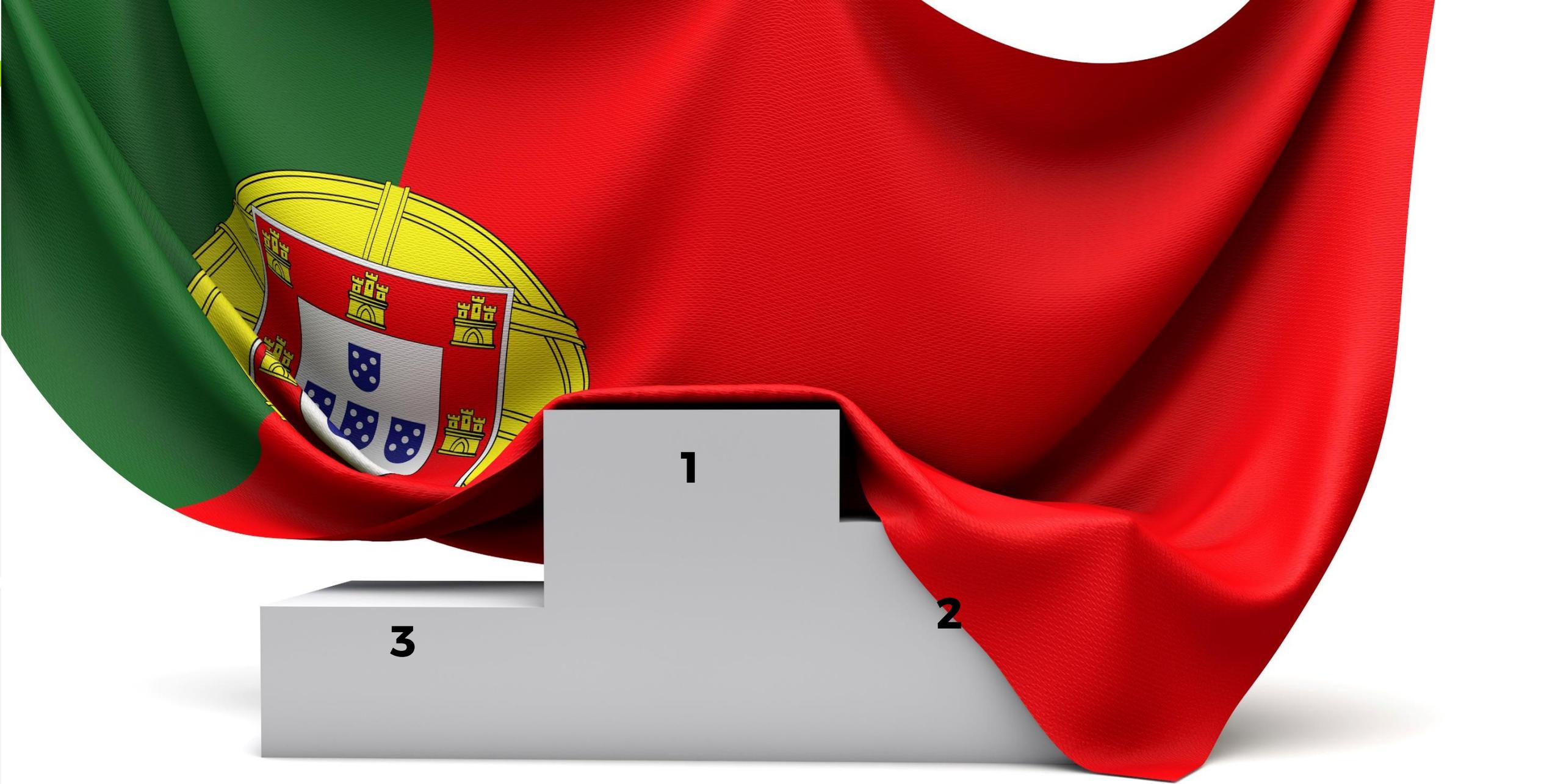
Rebuilding Momentum

Tom Goddard

President of the World Out of Home Organization

WELCOME TO PORTUGAL





LISBON - THE KEY ATTRACTIONS

3rd Place - THE WEATHER



2nd Place - THE FOOD



1st Place – MIX OF THE TRADITIONAL AND MODERN



WOO CONGRESS - EVENTS & GLOBAL SPONSORS

Event Sponsors



Platinum Sponsor



Platinum Sponsor

DREAMMEDIA

Gold Sponsor



Event Silver Sponsor

Unilumin

Event Silver Sponsor

VIOOH

Event Silver Sponsor

Abjen

Exhibitor



Exhibitor



Exhibitor



Exhibitor



Event Sponsor



Event Sponsor

SAMSUNG

Event Sponsor

WOO Global Sponsors



Platinum Global Sponsor



Platinum Global Sponsor

dentsu

Platinum Global Sponsor



Platinum Global Sponsor



Platinum Global Sponsor

TALON_ Think outside

Platinum Global Sponsor

VISTAR MEDIA

Platinum Global Sponsor



Gold Global Sponsor



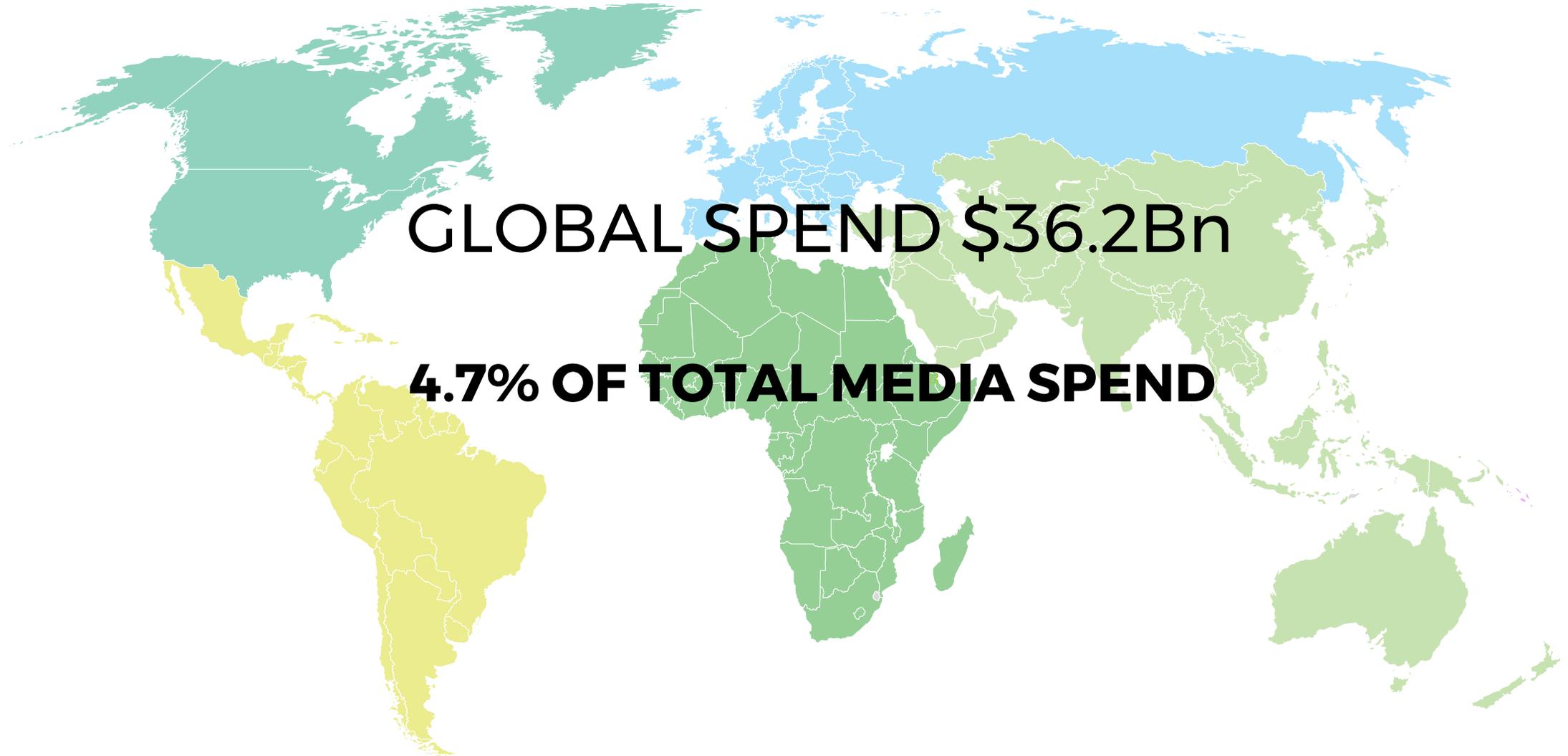
Gold Global Sponsor



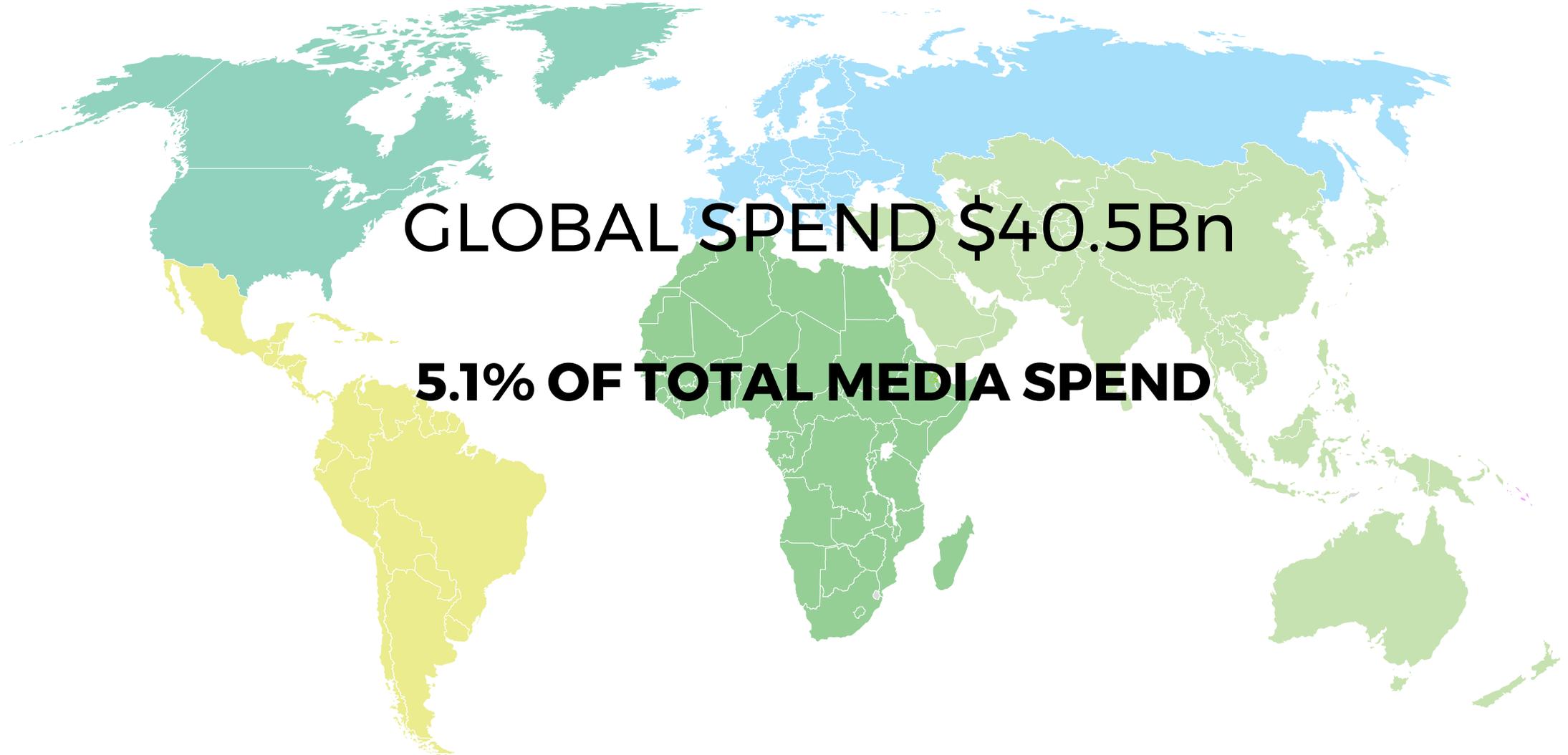
THE GLOBAL INDEX

THANK YOU FOR CONTRIBUTING

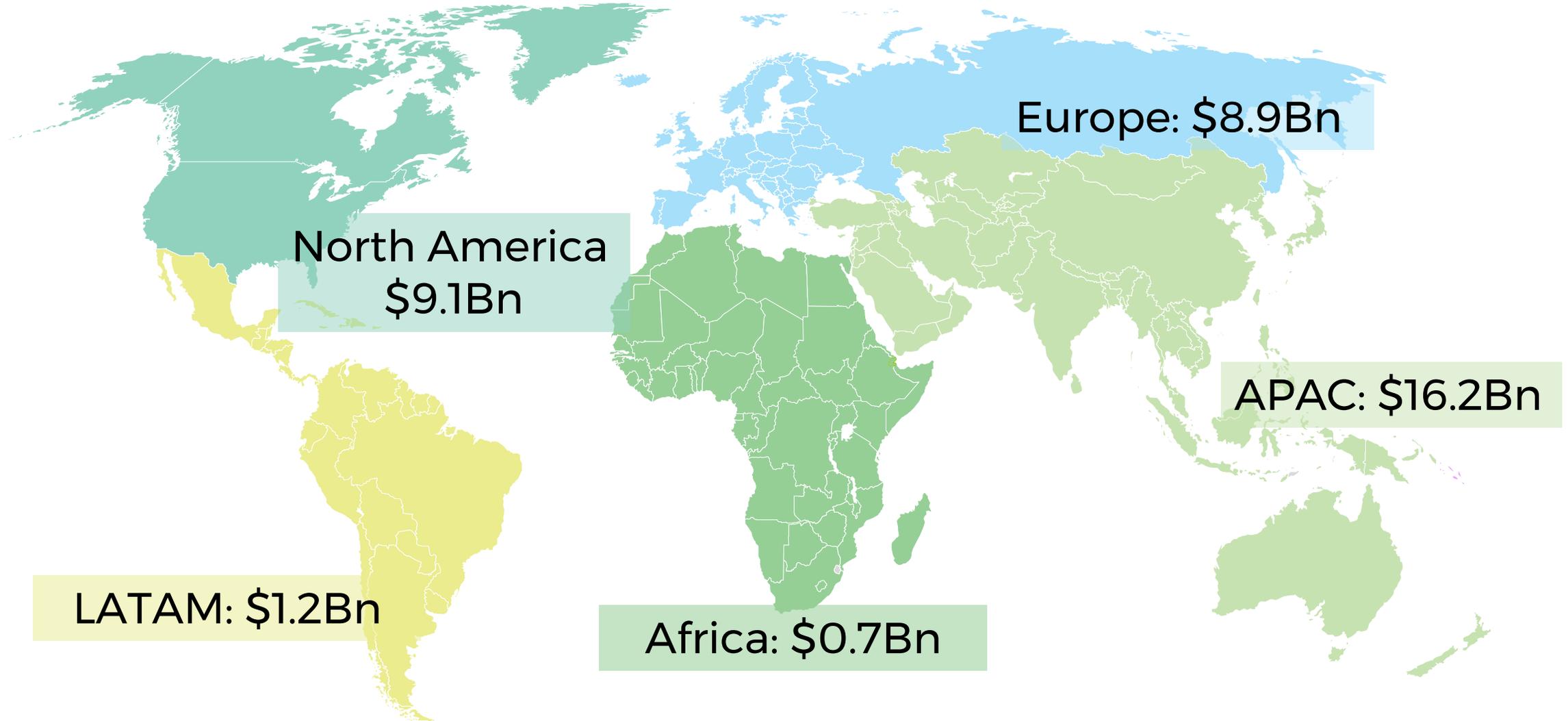
GLOBAL OOH SPEND AND % OF TOTAL ADEX FOR 2022



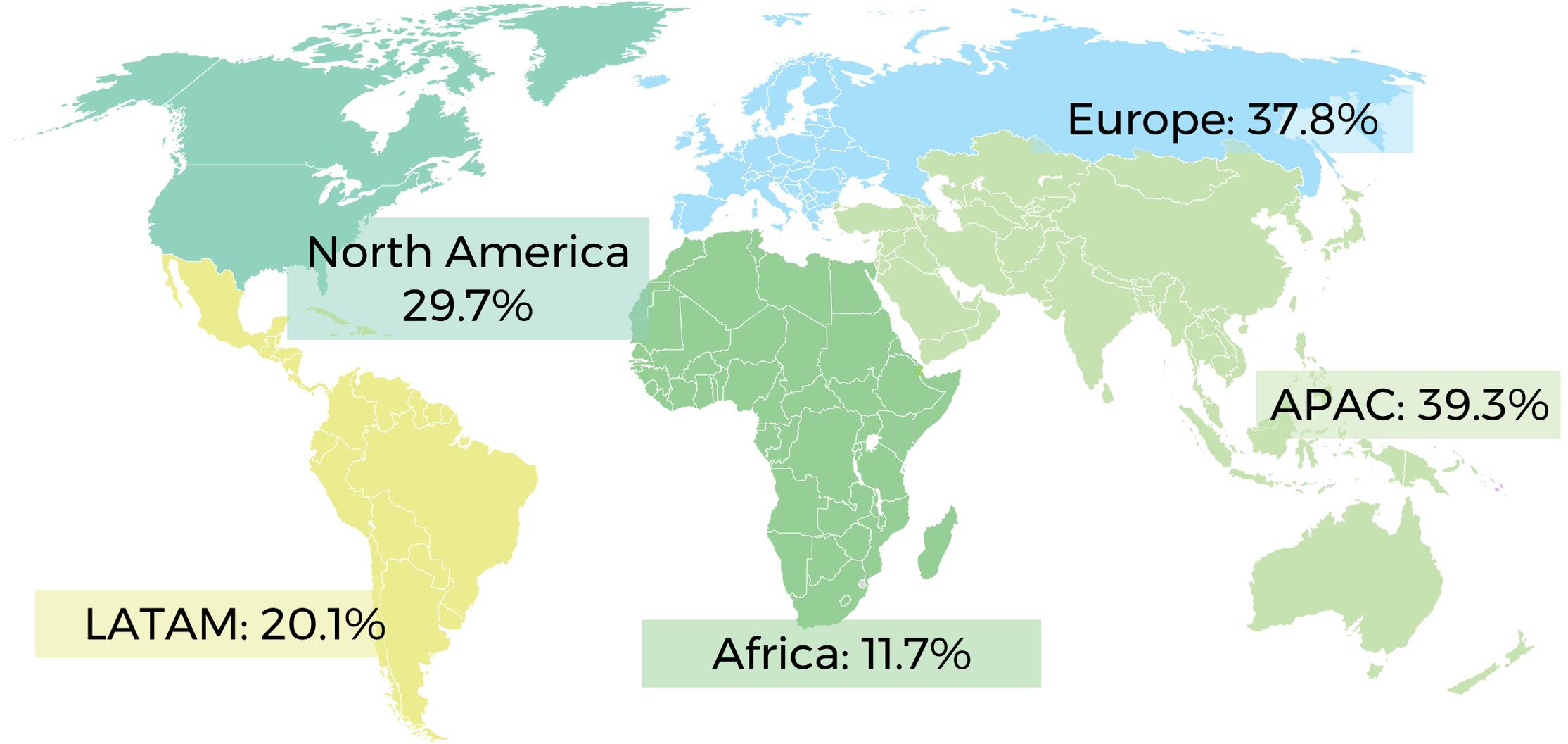
GLOBAL OOH SPEND AND % OF TOTAL ADEX FOR 2023



OOH SPEND BY REGION FOR 2022

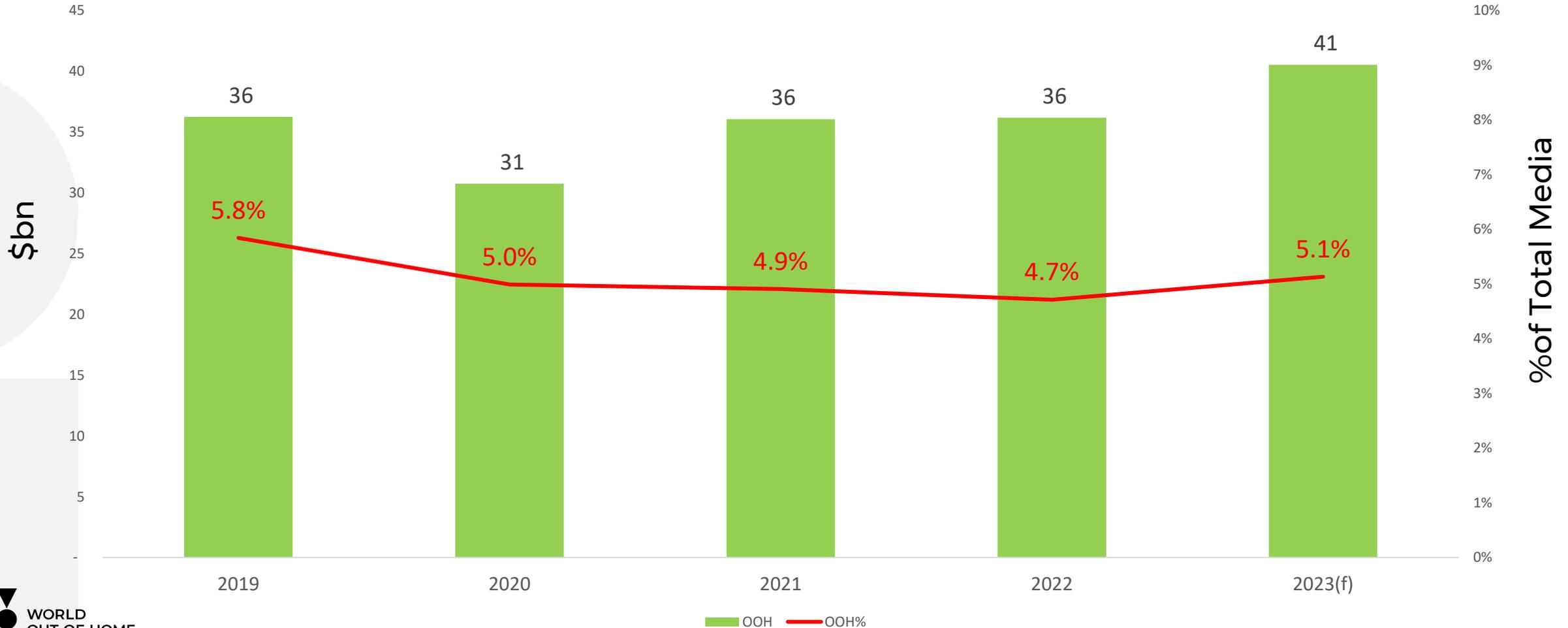


▶ DOOH as % of Total OOH -2022



GLOBAL OOH VOLUME AND % SHARE OF TOTAL MEDIA

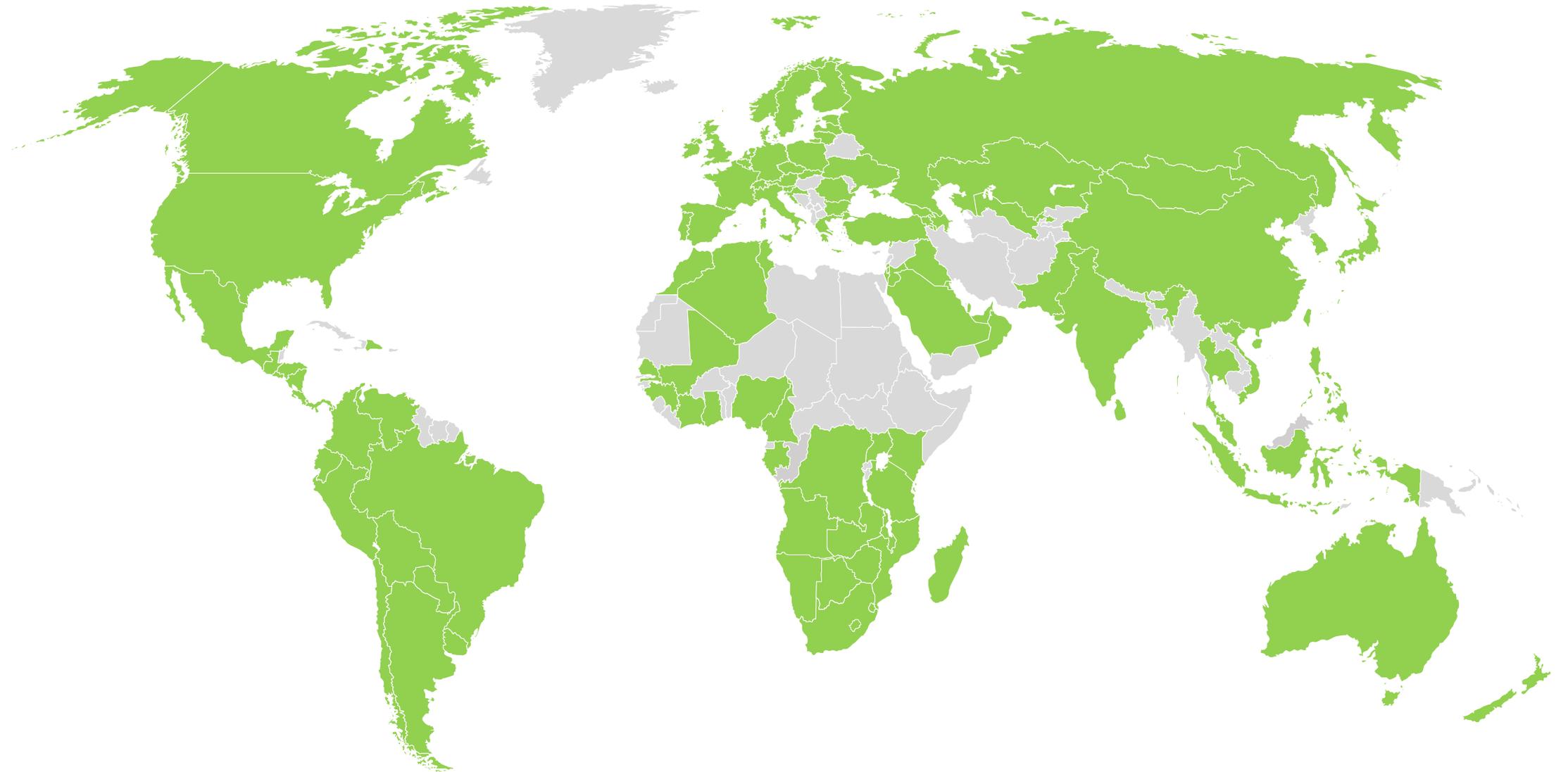
OOH VOLUME AND % SHARE OF TOTAL MEDIA





WOO ANNUAL UPDATE

195 members in over 100 Countries





WOO AMBASSADORS



Angie Cutter
Asia



Francesca Vincenti
MENA



Jim Liu
China



Adriana Araúz
LATAM



Rebecca Chang
China

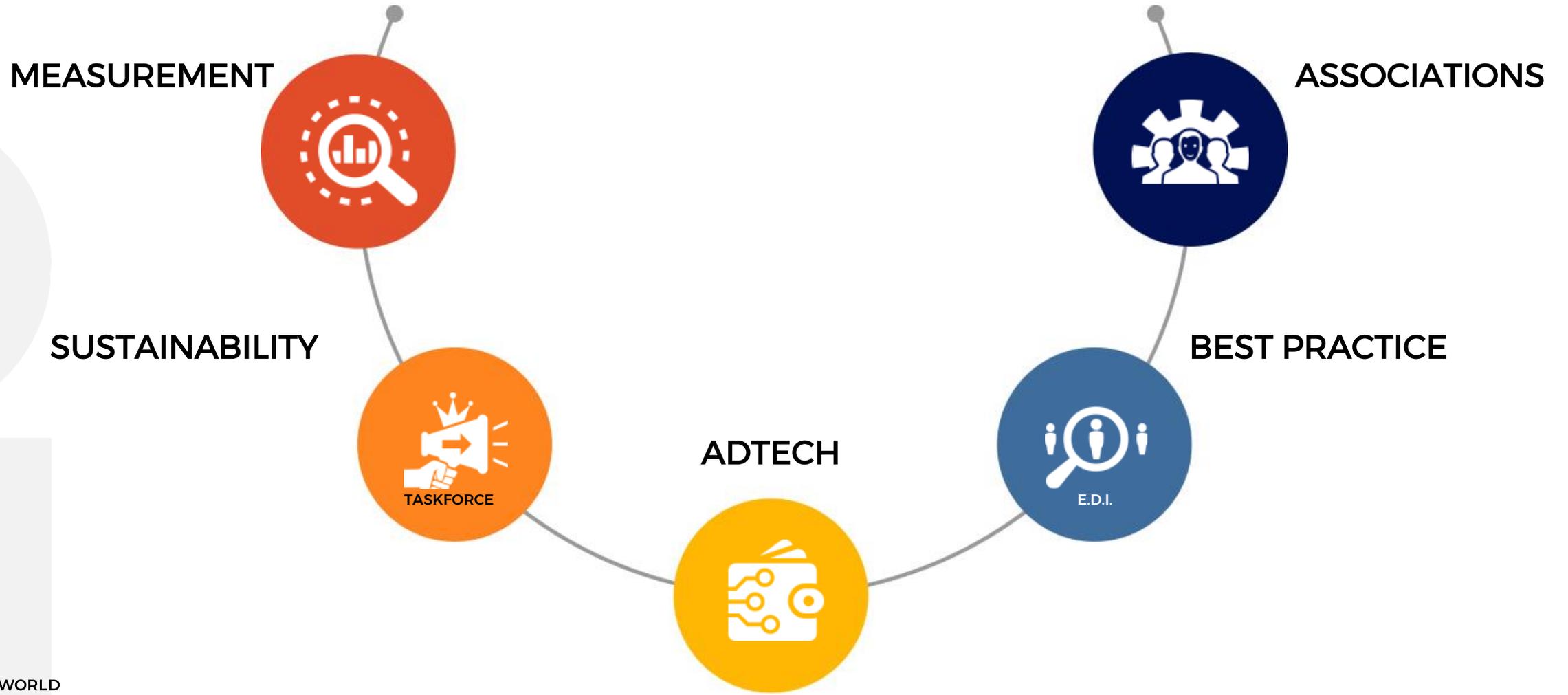


Jorja Wilkins
South Africa



Hyun Lee
South Korea

KEY AREAS OF FOCUS - 2023



SUSTAINABILITY

“The global conversation about media sustainability is just beginning. It’s time for more action and less talk as we surge toward a greener tomorrow. With more eyes on advertisers than ever, it is evident that the corporate responsibility of sustainability can no longer be delayed.”



Kirk McDonald
North America CEO
GroupM



Amy Armstrong
Director of Global Customer Development
Amazon Ads

"Sustainability is a necessity for consumers, brands, and agencies alike."

SUSTAINABILITY

| | | | | | | | | | | | | | |
|---|--|---|--|--|---|--|--|--|--|--|--|--|--|
|  <p>Adam Green Broadsign Reach Canada</p> |  <p>Annina B. Bleek Solutions Studio, Stroer Germany</p> |  <p>Ben Milne Dentsu Int. Markets UK</p> |  <p>Kai-Marcus Thasler MD FAW e.V. Germany</p> |  <p>Martin Corke Clear Channel UK UK</p> |  <p>Lenaic Pineau JCDecaux France</p> |  <p>Tim Lumb Outsmart OOH UK</p> | | | | | | | |
|  <p>WORLD OUT OF HOME ORGANIZATION</p> | | | | | | | <h1>SUSTAINABILITY</h1> <h2>WOO TASK FORCE 2023</h2> | | | | | | |
|  <p>Jorja Wilkins Pimedia Outdoor South Africa</p> |  <p>Judd GuthMiller Daktronics USA</p> |  <p>Katrin A. Robertson BlowUP Media UK / Germany</p> |  <p>Jeff Jan OAAA USA</p> |  <p>Danielle Austin Evolve OOH UK</p> |  <p>Stephanie Helen Scheller Omnicom Germany</p> |  <p>Oli Ford Kinetic Worldwide UK</p> | | | | | | | |

► SUSTAINABILITY - QUICK WINS

- Taskforce has now met twice – will meet quarterly
- Sustainability panel - Ben Milne moderating - a Congress highlight
- Sustainability section of the WOO database to launch this summer
- This will
 - Share best practice,
 - Exchange and collect real Net Zero Initiatives
 - Highlight latest Innovation



BOARD ROTATION AND SUCCESSION

Board Governance



Tom Goddard
President WOO
UK



Anna Bager
OAAA
UNITED STATES



Gabriel Cedrone
ALOOH
LATAM



Martin Corke
Clear Channel
UK



Daniel Hofer
JCDecaux
FRANCE



Christian Schmalzl
Ströer
GERMANY



Vincent Lam
Asiaray Media Group
CHINA



Katrin Robertson
blowUP media
UK



Guillermo de Lella
ALOOH
LATAM



Jeremy Male
Outfront Media
US / CANADA



Noomi Mehta
Selvel One Group
INDIA



Cathy O'Connor
oOh!media
AUSTRALIA



Charles Parry-Okeden
OMA
AUSTRALIA



Sean Reilly
Lamar Advertising
UNITED STATES



Dave Roberts
Primemedia Outdoor
S. AFRICA



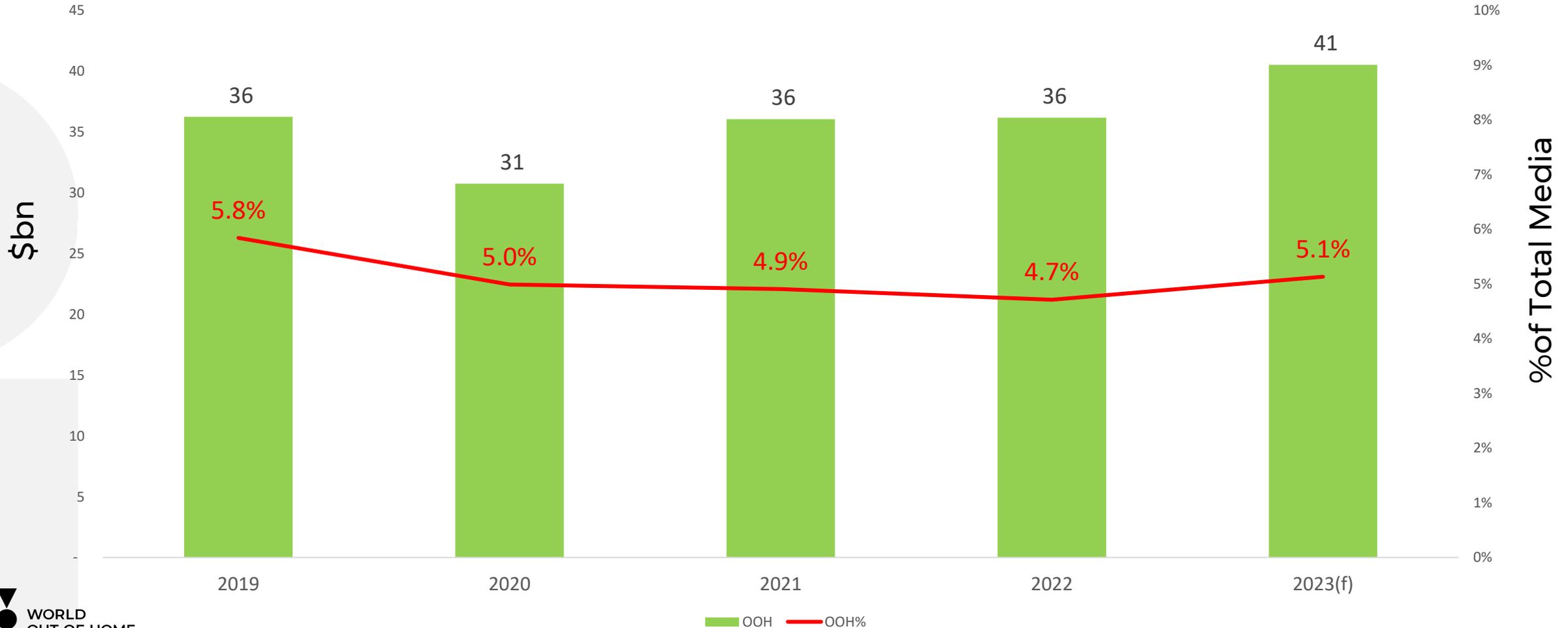
Kai-Marcus Thäsler
FAW
GERMANY

SUCCESSION

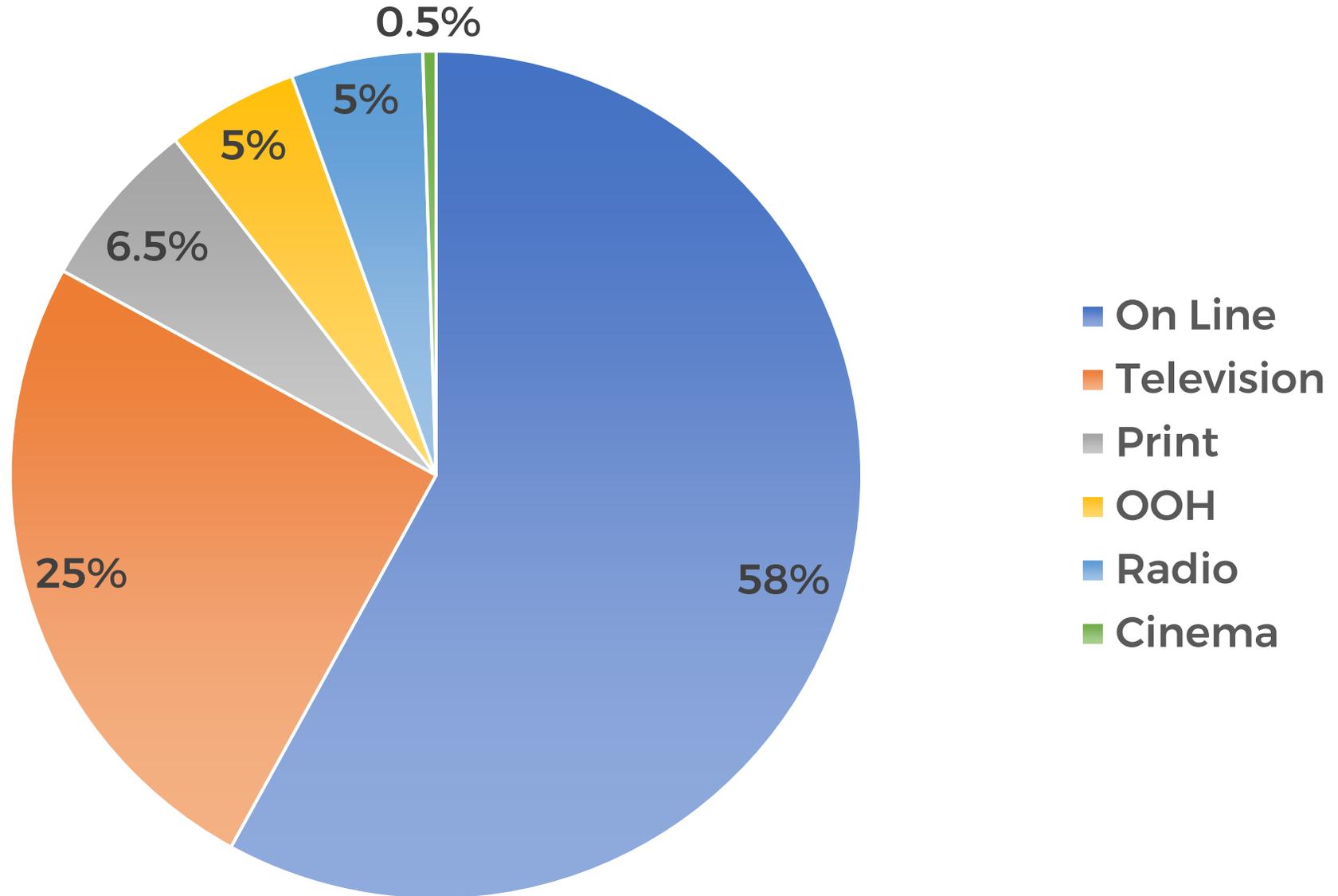


GLOBAL OOH VOLUME AND % SHARE OF TOTAL MEDIA

OOH VOLUME AND % SHARE OF TOTAL MEDIA



THE 5% SYNDROME



Dentsu: Share of global ad spend by channel 2022

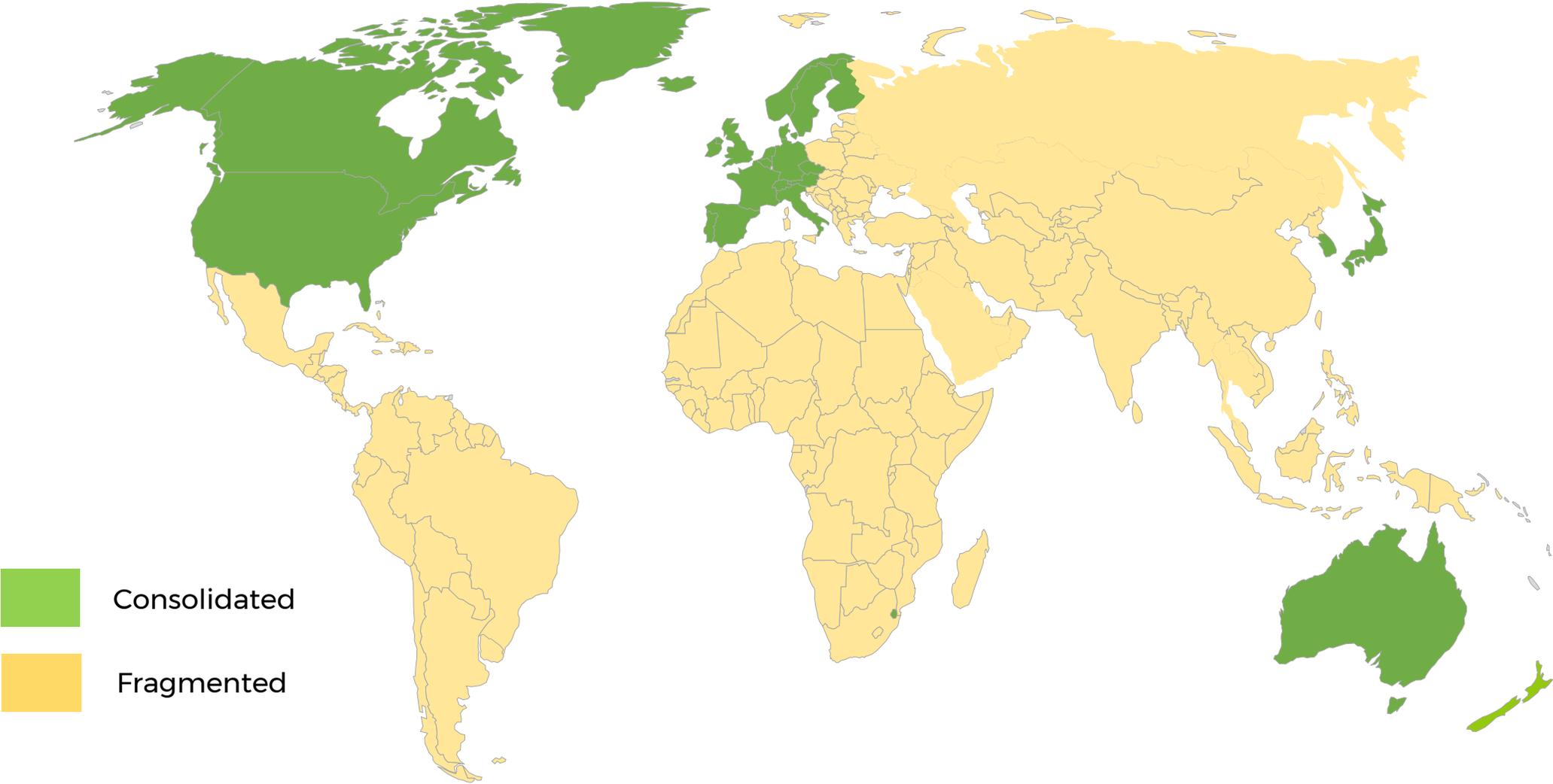
TAG HEUER 3D ANAMORPHIC GLOBAL CAMPAIGN



▶ WHAT'S HOLDING OUR SHARE BACK

- To many sales points due to lack of consolidation.
- AdTech proliferation.
- Lack of common standards and language.
- Patchy audience measurement

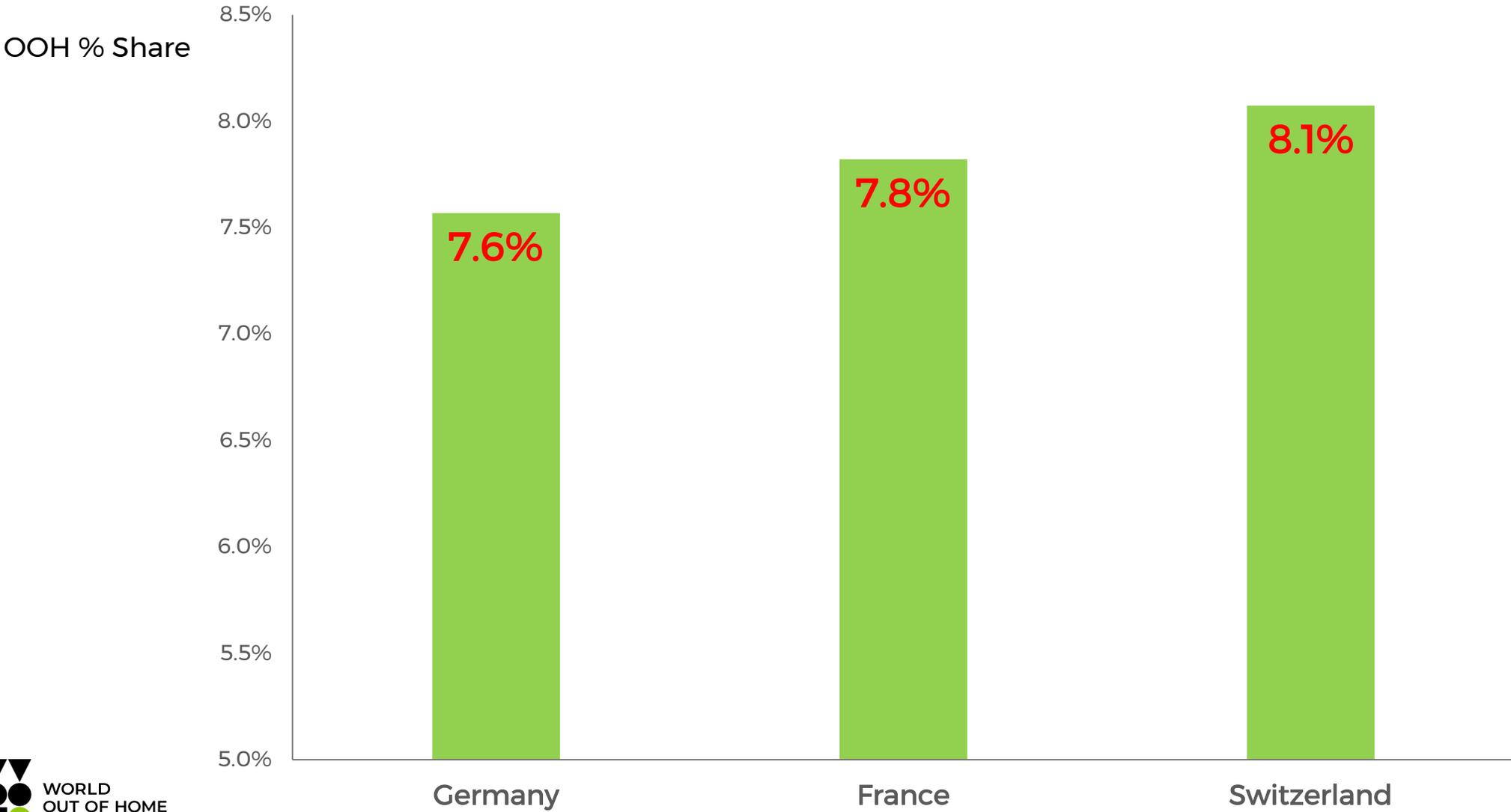
REDUCE THE NUMBER OF SALES POINTS



 Consolidated
 Fragmented

THE 3 EUROPEAN CONSOLIDATED MARKETS

OOH% SHARE OF TOTAL MEDIA



OUT OF HOME LUMAscape

MARKETER

OOH DISPLAYS PEOPLE



COMMON STANDARDS

MEASUREMENT
BEST PRACTICE



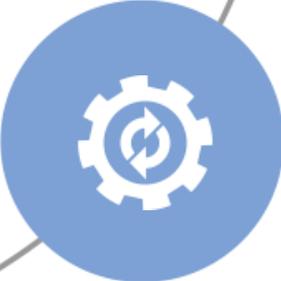
NOMENCLATURE



APPROACH TO
SUSTAINABILITY

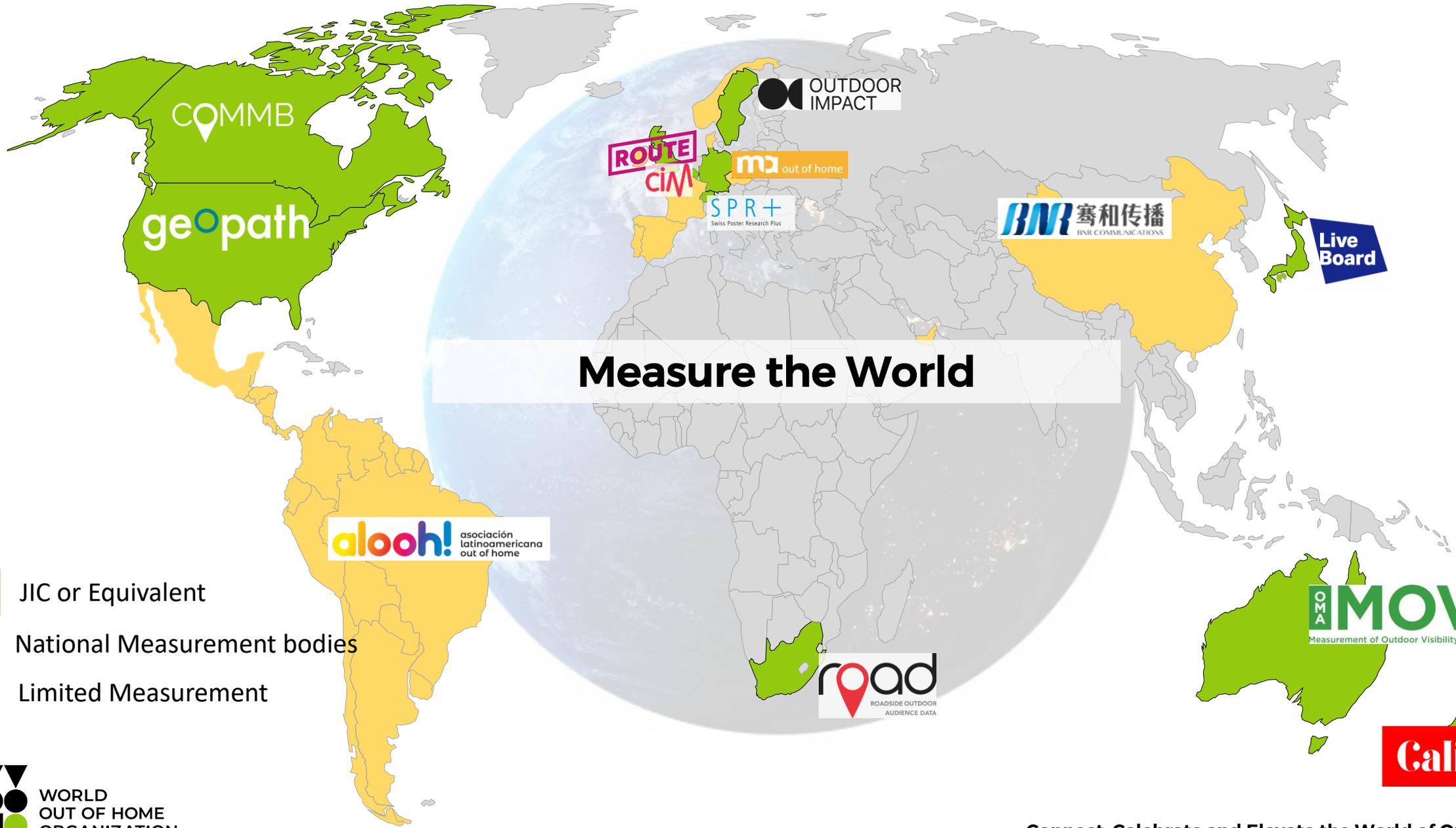


DISPLAY FORMATS



COMMON ADTECH
APPROACH





Measure the World

- JIC or Equivalent
- National Measurement bodies
- Limited Measurement

WELL RESOURCED AND EMPOWERED NATIONAL ASSOCIATIONS



USA



BRAZIL



BULGARIA



POLAND



NETHERLANDS



SOUTH KOREA



VIETNAM



CANADA



ARGENTINA



GERMANY



CHINA



SWEDEN



SPAIN



THAILAND



GREAT BRITAIN



INDIA



SOUTH AFRICA



JAPAN



AUSTRALIA



MALAYSIA

SUMMARY

Increased competition regulations

Accelerate Media Owner Consolidation (slash number of sales points)

Centralise agency/brand trading onto larger and fewer SSP's.

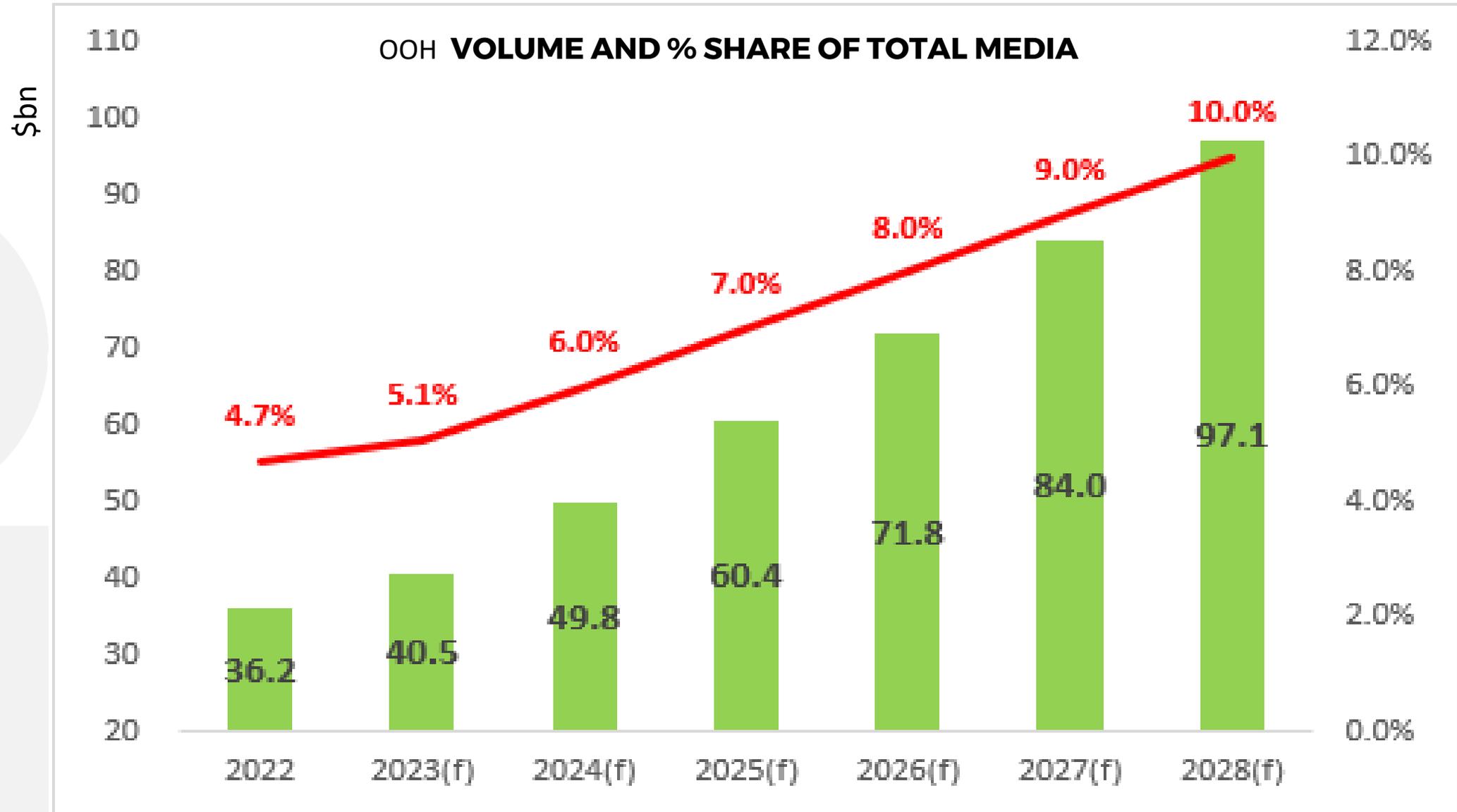
Cast off the silo mentality, especially in relation to AdTech.

Unmeasured Markets need to step-up to the plate and invest heavily

Mobilise and empower National Associations to set common standards and keep us focused on sector growth

GLOBAL

OOH Volume and % Share of Total Media - Lets make it happen





Co-CEOs: Wiles and Collins



31 May 2023 | [Ella Sagar](#)

The Media Leader interview

Chris Collins and Dallas Wiles tell Ella Sagar about their plan for outdoor to attract 10% of UK advertising spend — more than double what it is today — and stop harking back to the pre-pandemic times.

WELCOMING OUR FANTASTIC SPEAKERS AND PANELLISTS

